ePlan Submittal

Project Coordinator
Quick Reference Guide

Application Submittal

- Project creation
  - Initialize application in Permits Plus (include all associated request information)
  - Initiate "PL-10 ProjectDox Workflow"
    - Click on the "Workflow" button.
    - Click on Tab "5 Admin Functions."
    - Click "Generate New Workflow."
    - Change the Use field from "No" to "Yes" on Workflow Type PL-10.
    - Click "Generate Once."
- Route for Review
  - Verify that all files needed to begin the review process have been uploaded in ProjectDox.
    - Open the notification email.
    - Click on the "Project Access Link" in the email.
    - Log into ProjectDox.
    - Click on the Application number for this project in the "Active projects for ..." section of the "Projects" page.
    - Click on the "Application Plans (PDF)" folder to verify the necessary files have been uploaded.
    - Repeat for other folders as necessary
  - Click "Task List" button.
  - Click on "Application Review Request"
  - Click "Start Permit Review" to open Review Agencies section of eForm.
  - Select Agencies to participate in the review.
  - Click "Notify Selected Reviewers" button.
  - Click "Enable Agency Reviews"
- Complete Review Task
  - Mark up appropriate PDF file(s) in Application Plans (PDF) folder.
    - Open the pdf you are going to review
    - Click on the markup button and select "New" to open the markup tools.
    - Create your markup ***Note: Keep in mind color coding for creating markups***
    - Save your markup ***Note: Keep in mind naming conventions for saving markups***
  - Upload PDFs of documents or memos (if any) regarding your review to the "Miscellaneous Documents" folder
  - Open the "Review Comments" eForm
    - Select your review determination radio button on the eForm
    - Enter your review comments (if any)
    - Click OK to add your comment to the eForm
    - Click the "Complete Review" button (REQUIRED)
- Compile Review Comments to determine if resubmittal is required